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ABSTRACT

Chapter 13 of a revised volume on school leadership, this chapter offers suggestions to help educators improve their performance in meetings, both as group leaders and as participants. Well-run meetings can rejuvenate an organization, leading to improved teamwork, communication, and morale. A poor meeting, on the other hand, can have a debilitating effect on an entire organization. Education cannot afford the price of unproductive and unsatisfactory meetings. Instead, meetings must have goals and a purpose--ideally, to exchange information and ideas and to obtain a commitment for action. Meetings must also satisfy personal needs for affiliation, achievement, activity, and power. Choosing an appropriate leadership style and planning an agenda are essential. A meeting takes shape as the participants are invited, the seating arrangements are determined, the meeting room is arranged, and the agendas and background information are distributed. Using the agenda as a road map, the leader guides the group through the problem-solving and decision-making maze, remaining alert to negative energy and maintaining the group's equanimity as needed. As decisions are made, the leader helps designate responsibilities and sets action deadlines. After the meeting, the leader distributes the minutes or executive summary, follows up on the decisions made, and evaluates the meeting's effectiveness. Giving careful thought to purpose, planning, and participants' needs can make all the difference. (MLH)

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Chapter 13
Leading Meetings

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"Our meetings are so boring! We never seem to get anything done."

"The same people make the decisions all the time, and no one else gets involved."

"Why should we bother when most of our decisions never get carried through. No one remembers who's responsible for what and our plans are forgotten."

"As often as the principal says he wants us to be involved, he always seems to have things work out his way."

How often have you heard similar conversations take place after supposedly productive meetings? Why do so many meetings seem to be a waste of time for their participants? In addition to being unproductive for the school, they give individuals little personal satisfaction; in fact, research indicates that meetings can become a major source of dissatisfaction in an organization.

How can meetings become unproductive or even counterproductive? Meetings, of course, are only a part of the total workings of the school organization. What takes place in a meeting is often a reflection of the attitudes, relationships, and organization of the larger school system. "Every meeting is a microcosm," says Richard Dunsing, "a condensed version of the values and style of the organization."

Meetings may be shaped by the norms of the system in which they take place, but what takes place in meetings can generate a "ripple effect" on the rest of the organization. "A meeting of fifteen people," say Michael Doyle and David Straus, "can affect how 300 people work--or don't work--for the rest of the day or week or even permanently." Well-run meetings can rejuvenate an organization, leading to improved teamwork, communication, and morale on many levels. A poor meeting, on the other hand, can have a debilitating effect on an entire organization.

The problem of unproductive meetings is usually part of the larger problem of ineffective organization. Government and nonprofit organizations seem most prone to "sluggish" organizational operation, one reason being the lack of direct personal reward for increasing efficiency. It is no accident that the great majority of literature on improving meetings comes from the profit- and survival-oriented business world.

Contributing to the problem of ineffective meetings is a simple lack of organizational and human-relation skills. Most of these skills are as old as meet-

ings themselves, such as dealing with the long-winded participant, creating an agenda and sticking to it, and ensuring that responsibilities are assigned and deadlines set.

Robert Maidment and William Bullock, Jr. note that the primary distinction between efficiency and effectiveness is that of "doing the job right" and "doing the right job." Unfortunately, the first does not ensure the latter, as proved by the occurrence of "efficient meetings that yielded totally ineffective outcomes." Social scientists in the field of group dynamics have been studying for decades the interactions of group members to determine how the communications process can be improved. And in the behavioral sciences, a procedure called *organizational development* examines the whole of the communications structures of organizations. Both of these fields have shed new light on ways to make meetings more effective.

This chapter presents many suggestions aimed at helping educators improve their performance in meetings, both as group leaders and as participants. Before getting involved with the more practical aspects of meeting management, however, we examine the importance of establishing clear-cut goals and values for your meetings.

Goals and Values of Meetings

There is a set of simple questions that every meeting planner should consider before calling a meeting: What do I want to accomplish with this meeting? What goals and objectives do I wish to reach? Is a meeting the best route to my goal, or might another form of communication be more efficient? What are the other values in meetings in addition to the obvious practical ends they achieve? Each of these questions will be considered in turn.

Meetings with Purpose

"No wind favors him who has no destined port," goes the old saying. Yet how many meetings have you attended that have drifted pointlessly with no obvious goals or purposes to guide them. Every meeting needs one or more definite purposes that are known to all group members, and it is best when members are actively involved in determining what those purposes will be.

Most meetings take place for one or more of the following reasons:

- to receive or give information
- to make a decision
- to define, analyze, or solve a problem
- to reconcile conflicts
- to express feelings (for example, a gripe-session or rap-session)

Perhaps the most common complaint concerning meetings is that there are too many of them. Participants begin to feel that they are present only to take part in an organizational ritual. "One-way, information-giving meetings," states Jack Whitehead, Jr., "can seldom be justified as either efficient or effec-

tive." The most important purpose of any meeting may be that of "exchanging information and opinion and obtaining commitments for action."

Information

Some meetings are designed primarily for the exchange of information among participants. The meeting leader may want simply to brief or instruct members, as in a training session. Conversely, the leader may want to receive reports from participants. In this type of meeting, a more autocratic leadership style is usually the most efficient.

The most important advantage of an information meeting over a memo or written report is that reaction and feedback can be immediate. Every member can hear the information presented and the reaction of all other members to it. According to Nicholas Criscuolo, however, too many information meetings can cause teachers to complain, especially when meetings are called to relate routine announcements that could best be presented in "a bulletin or via the school's public address system."

Another problem with information meetings, according to Barbara and Kenneth Palmer, is that too many meeting leaders fail to recognize the importance of "dejargonizing and personalizing content." The best way to deal with complex information is to personalize it by relating how it will significantly affect the students in the school or the working atmosphere of the members of the meeting. "Directed role play" can be used to this end by creating a mental scenario of changes that may take place. The end goal, of course, is to reduce confusion and to stimulate interest and attention.

Decision-Making

Decision-making style ranges from the autocratic to the truly democratic. An autocrat may simply wish to get some input from participants before making a decision. In meetings with a more democratic style of decision-making, everyone who has a critical stake in a decision is given a chance to be heard and to influence the final decision.

Problem-Solving

Several heads are usually better than one, particularly for defining, analyzing, and solving problems. In a problem-solving session, a group can combine "the bits and pieces of experience and insight which may lead to a common understanding," says B. Y. Auger. "One person may describe an effect, while another suggests a plausible reason for it." Out of this pattern of exchange, an acceptable cause-and-effect relationship may be discovered.

Problem-solving sessions can also help to correct the flaws and idiosyncracies in the thinking of individuals. An effective group may be flexible and wide-ranging in its thought, but at the same time sift out impractical or far-flung ideas.

Leadership style can vary widely in problem-solving meetings,

depending on the nature of the problem, time limitations, and other variables. For example, a brainstorming session might be called to foster ideas for increasing community awareness of certain school programs. In such a session, a very informal, democratic atmosphere would be needed to stimulate a variety of ideas. If, on the other hand, the analysis of a problem calls for an orderly presentation of data and some hard thinking, a more leader-controlled meeting would be more efficient.

Reconciling Conflicts

A meeting is often the only place to explore sharp differences of opinion and to negotiate some kind of compromise. This type of meeting requires tight control so that tempers do not flare. If the conflict does not directly affect the group leader, he or she can work primarily as a facilitator, bringing out and clarifying points of contention, making sure that each side's case is fully heard, and hammering out compromises. When the group leader is one of the principal contenders, it is necessary (and sometimes required by law) to appoint a neutral third party to manage the conflict.

The three primary channels for resolving conflict, according to the Palmers, are *force*, *arbitration*, and *mediation* or *negotiation*. If a conflict in a meeting is limited to three or fewer members, it may best be solved directly by force—the group leader simply states and enforces a decision. When a larger group of participants are in conflict over a relatively simple problem, the leader should use arbitration or a vote of all members to end the discussion with a decision.

But when a meeting's participants voice sharply different ideas and viewpoints on an important issue, the Palmers say that the only fair and efficient way to resolve conflict is through mediation or negotiation. Time must be invested "to explore all aspects of the dispute or conflict, look at a full range of alternatives for resolving the conflict, and work toward a mutually agreeable decision," they state. When a leader is perceived to be less than absolutely neutral in a decision, it is important that the more democratic channels for resolution are used.

The resolution of personal conflicts should not be attempted during meetings, nor should the group leader discipline or reprimand organizational members while a meeting is in progress. Such actions, when necessary, are best carried out through individual meetings and actions.

Expressing Feelings

It is often useful to hold gripe-sessions or rap-sessions with staff members to sound out their feelings about the organization and its administration. Such meetings should be as permissive and unstructured as possible, for they are important steam valves for an organization. The leader should remain in the background and allow members to contribute spontaneously.

When teachers feel that meetings they attend are meaningless or boring, Criscuolo suggests that administrators involve participants in setting agenda topics. One way is to form a committee to research and present agenda topics and themes felt to be of particular importance. Even a simple action, such as placing a blackboard or clipboard in the faculty lounge for teachers to write down possible topics or issues for the next staff meeting, can enable participants to become more involved in meetings. The strategic placing of "favored" topics can also help maintain interest and involvement during mundane but necessary items on the agenda.

Is a Meeting Necessary?

The best way to reduce the huge amount of time wasted in meetings is to ask the simple question of whether the goals of the meeting might be reached in some other, more efficient way. Too many meetings are called simply because it's that time of the week or month. "An effective leader," Whitehead states, "will consider whether 6 ten-minute one-on-one meetings with individuals would be more effective than bringing them all together for a single meeting." Memos or telephone calls (individual or conference) can often accomplish the communication desired without the time and expense of a meeting.

A general rule of thumb is that meetings should not be called when an individual decision-maker can get better results. Individuals are more efficient when the matters to be decided are routine and, surprisingly, when the decision depends on the use of subtle, hard-to-explain reasoning that cannot be done spontaneously. "Research indicates that subtle reasoning problems are generally performed more accurately by individuals than by meetings," reports Barry Maude. "The great danger of presenting difficult reasoning problems to meetings to solve is that the competent members (those who know how to solve the problem) may be out-voted or even convinced by the rest."

When meeting planners neglect to consider cost effectiveness, Whitehead notes, "the amount of funds being allocated in the meeting" can be "exceeded by the total cost of the hourly rates of the individuals making the decision." The Palmers' book contains several worksheets for quickly computing the costs of a meeting and comparing them with the costs of alternatives, such as a mailed report, a conference call, or individual meetings. The net savings from such alternatives can equal thousands of dollars. An example of such a worksheet, adapting the Palmers' model to the field of education, is included in table 1.

However true this may be in the solving of some problems, meetings often serve as a valuable check on the errors in reasoning of some members. In the broad area between very simple and very complex reasoning tasks, research shows, again according to Maude, that group decisions are more likely to be on target than individual decisions. It is also sensible to reveal as much of the reasoning process as possible to public scrutiny in this era of increasing accountability.

Table 1. Cost Comparison Worksheet

A.	**Meeting Cost**	
	Preparation—by chairperson	
	4 hours @ $25.00 hr. (salary &benefits)	$100.00
	Preparation—by key participants	
	2 participants @ $20.00 hr. x 2 hours	80.00
	Preparation—by other participants	
	6 participants @ $20.00 hr. x .5 hour	60.00
	Preparation—by staff	
	2 staff @ avg. salary of $8.50 hr. x 4 hours	68.00
	Materials/Supplies	
	Printed material $25.00 + refreshment $10.00	35.00
	Meeting Times	
	Chairperson @ $25.00 hr. x 2 hours	50.00
	8 participants @ $20.00 hr. x 2 hours	320.00
	Meeting Cost Total	$713.00
B.	**First Alternative—A fifteen page report**	
	Research/writing/proofreading—by author	
	15 hours @ $20.00 hr. (salary & benefits)	$300.00
	Typing and Correcting—by staff person	
	3 hours @ avg. salary of $8.75 hr.	25.25
	Duplicating	
	9 copies @ $0.60	5.40
	Review—by chairperson	
	1 hour @ $25.00 hr.	25.00
	Review—by recipients	
	.75 hour @ $20.00 hr. x 8 participants	120.00
	First Alternative Total	$475.65
C.	**Second Alternative—Individual consultations with selected individuals**	
	Preparation—by chairperson	
	2 hours @ $25.00 hr. (salary & benefits)	$50.00
	Preparation—by participants	
	1 hours@ $20.00 hr. x 4 participants	80.00
	Printed Materials	15.00
	Meeting Time	
	Chairperson @ $25.00 hr. x 4 hours	100.00
	4 participants @ $20.00 hr. x 1 hour	80.00
	Second Alternative Total	$325.00

Hidden Values of Meetings

Most meetings can achieve more than the organizational goals stated on the agenda. Meetings satisfy, or can satisfy, the personal and emotional needs of individual members, especially those of participation, belonging, achievement, and power. Participants interact, develop roles, and share their experiences, problems, and successes.

Meetings also play an important role in building the cohesiveness of an organization. "In the simplest and most basic way," states Antony Jay, "a meeting defines the team, the group, or the unit. Those present belong to it; those absent do not. Everyone is able to look around and perceive the whole group and sense the collective identity of which he or she forms a part."

Richard Schmuck and his colleagues characterize the values of school meetings as follows:

> Meetings provide an opportunity for participation not found in memos, newsletters, loudspeaker announcements, and the like. They enable an immediate check of reactions to what another person has just said and to one's own immediate utterances as well. If managed effectively, meetings can be the principal channel for bringing staff members into collaboration to reach common understandings and for that reason can be highly productive and satisfying events in the life of an organization.

Basics of Meeting Planning

"Conducting a meeting without a plan," states Jack Parker, "is much like trying to build a house without blueprints. It can be done, of course, but the end result is likely to be less than desirable and the process can be expensive and nerve-wracking."

Engineering a successful meeting requires careful strategic planning. The meeting planner should try to imagine what is likely to happen in the meeting from beginning to end, especially barriers that may impede progress. The decided purpose of the meeting should provide a preliminary idea of who will be attending and what might transpire. From that point, the planner should consider the stakes that the meeting participants have in the matters to discuss. How will their personalities and stances affect the course of discussion? What conflicts are likely to develop between participants? Who will be asked to change or adjust, and how might they react?

The purpose of every meeting should be to gather the skills required to solve targeted problems. If the skills are not available within the organization, the meeting planner should consider inviting experts. Once the critical issues on which a decision might hinge are identified, the range of possible compromises can be determined. Every situation is different, but most decisions are made by deciding what can and cannot be traded off.

Other important facets of meeting planning, discussed in the follow-

ing pages, include writing up the agenda and allotting time for each item, deciding who will attend, arranging the seating, and selecting the meeting room.

The Agenda and Time Considerations

The agenda is the heart of the organizational structure of a meeting. "Without an agenda, the most skilled meeting leader might not be able to bring off a meeting successfully," says B. Y. Auger.

> With an agenda, however, he is able to devote his talents to managing the interplay of personalities in the meeting room. He can do this more effectively because he knows what he wants to achieve. With this general strategy mapped out in the agenda, he can concentrate on the more fluid tactics of the meeting room.

Before a meeting, it is wise to consult with meeting participants to determine what topics need to be on the agenda. Premeeting discussions can sometimes eliminate the need to put a topic on the agenda, saving everyone's time. Early consultation can also stimulate participants to properly prepare for the meeting. To receive participant input, Don Halverson suggests "circulating a skeletal or blank agenda and asking for agenda items."

Once the agenda is complete, it should be distributed to meeting participants. Since participants should have at least twenty-four hours to give careful consideration to meeting topics, the agenda should be distributed one to three days before the meeting. If the agenda is circulated too far in advance, some participants may forget it or lose it.

When a meeting is called on short notice, advance distribution of the agenda may be impossible. On the other hand, early distribution may be necessary for an elaborate meeting or one requiring detailed preparation.

In addition to the agenda, any necessary background information should be distributed to participants before the meeting. "High quality information leads to high quality decisions," says Maude, and prevents a discussion from becoming "a mere pooling of ignorance." Brief and concise background information can allow participants to consider matters carefully in advance and formulate useful questions. The information may be best summarized by the meeting planner after receiving a complete review of background data from each person who will make a presentation at the meeting.

The agenda should include definite starting and ending times of the meeting. Since participants have other responsibilities and appointments to attend to, it is only common courtesy that they know when the meeting will be over.

Meetings should also have an internal structuring of time. When estimating the amount of time for each agenda item, the meeting planner should consider again whether the topics are worthy of consideration. Whitehead notes that meetings often correspond to "a type of Parkinson's Law in which the length of time it takes to reach a decision expands to the amount of time

available." Trivial problems should be resolved quickly, but it is best when the group itself decides upon time limitations for discussions and resolves simple decisions in as few minutes as possible. All should agree to limit useless discussion and avoid any superfluous additions.

When a meeting is held to resolve a complex problem, the group can avoid wasting a lot of time if it agrees in advance to follow a particular problem-solving strategy. For instance, Ken Blanchard outlines the "Ross Four-Step Agenda" developed by Ray Ross:

1. Define and limit the problem.
2. Determine the nature of the problem and its causes.
3. Establish and rank the criteria for solutions.
4. Evaluate and select solutions.

Such a systematic process helps the group to focus objectively on the clarification and solution of a problem.

Another aspect of meeting design that can be altered to achieve desired ends is the order of agenda items. Urgent items, of course, need to come before those that can wait. But if some items might divide members, and others might unite them, the meeting planner can vary their order to produce, hopefully, a smoother running meeting. In any case, it is always a good idea to end each meeting with a unifying item. Antony Jay makes these suggestions concerning the order of agenda items:

> The early part of a meeting tends to be more lively and creative than the end of it, so if an item needs mental energy, bright ideas, and clear heads, it may be better to put it high up on the list. Equally, if there is one item of great interest and concern to everyone, it may be a good idea to hold it back for a while and get some other useful work done first. Then the star item can be introduced to carry the meeting over the attention lag that sets in after the first 15 to 20 minutes of the meeting.

The overall length of meetings can also affect the quality of decision-making that takes place. Meetings that are scheduled to last longer than an hour may best be separated into a set of shorter meetings. Similar topics can be clustered in each meeting, allowing a smaller number of participants.

Meetings are not likely to remain productive after two hours. As Frank Snell points out, "Clear thinking falters as the clock goes round, and in turn, emotions take over. Weariness breeds dissension and contrariness." The ideal length seems to be from an hour to an hour and a half. If the meetings must be held for longer periods, be sure to provide coffee and fresh air breaks.

In addition to the meeting date, starting and ending times, and the place where the meeting is to be held, the agenda should contain a brief description of each topic, the objective desired for each topic (for example, decision, discussion, information), the name of the person responsible for each topic (who should introduce the item at the meeting), and an estimation of the time allotment for that item.

To encourage greater involvement and attention, Willard Fox recommends that each significant topic be given one page in the agenda. The topic is stated at the top of the page, followed by the name of the person who submitted the item for discussion. The remainder of the page includes decision alternatives, as well as an open space for participants to record additional alternatives. Providing space for an "Impact Statement," Fox states, allows participants to describe "the anticipated impact on the children, the facilities, the personnel, or the finances" of the school. Finally, at the bottom of the sheet participants can record motions, votes, final decisions, and actions to be taken. A worksheet for developing this type of agenda is presented in table 2. Each member's completed agenda can serve as a useful reminder of what decisions were made and who is responsible for what actions.

Although a firm structure is desirable for effective meetings, the planner should not "overstructure" the meeting. As Auger puts it, "One must not create the impression among the participants that the meeting has been so finally and rigidly preplanned that they are merely assembling to hear a proclamation." Participants should receive the impression "that there is a legitimate need for the meeting and that their views, information and problem-solving talents can be considered." So within the structure of the agenda, a good bit of flexibility is advised.

Who Shall Attend?

Once the desired goals of a meeting are determined, the question of who should participate will be half answered. The search then begins for those who are most affected by the issues to be discussed, those who have to give or receive information at the meeting, and those whose presence is necessary or desirable for decision-making purposes.

It is most important, according to Maude, that meeting participants be chosen from the organizational level most appropriate to deal with the problem. Experienced, upper-level administrators, for example, should be involved in deciding long-term policy issues, since they "have the experience and over-view to grasp the financial implications of a particular decision and to overcome the inherent uncertainty of this kind of long-term decision-making."

In the same respect, middle-level managerial decisions and day-to-day operating decisions should be made at the appropriate level. Maude warns against "inviting people to meetings simply because of their high status in the organisation." One secret of making meetings more efficient, he states, is to "push decisionmaking as far down the organisation as it will go, i.e. to the lowest level competent to handle the problem." This view corresponds directly with the suggestions of Thomas Peters and Robert Waterman noted in chapter 5 ("School-Based Management").

Depending on the goals of your meeting, you can invite either a group with diverse personalities or a more like-minded group. Maude cites evidence

Table 2. Sample Agenda

AGENDA
District C Managers' Conference
9:00 - 10:45 A.M.
Tuesday February 22, 1994
Central Meeting Room

9:00 A.M. Approval of Agenda — Al Herbert

9:05 - 9:25 Topic 1:

Shall district lunch program be contracted out next year?
(On the agenda at the request of Ed Freemont)

Alternatives

A.

B.

Other Alternatives

Impact Statement

Motion:

It was moved by _____ and seconded by _____.

Action: NELSON Y/N SMITH Y/N LEWIS Y/N FREEMONT Y/N HERBERT Y/N JONES Y/N WILSON Y/N O'NEIL Y/N

Passed _____ Failed _____

Action To Be Taken:

> that meetings made up of people of unlike personalities often produce better solutions than like-minded groups. The reason may be the wide range of ideas that is likely; or simply that different-minded people tend to disagree and this prevents over-hasty decisions being made.

For creative problem-solving sessions, it may pay to invite a range of people from different levels and backgrounds, perhaps even some "outsiders."

Once the people who might either do the meeting some good or gain something from it are identified, the next step is to pare down the attendee list so it includes only those members whose presence is absolutely necessary. There is universal agreement among meeting-improvement experts that a major reason for poor meetings is that too many people have been invited. .

Although the philosophy of the public sector necessitates the use of "participative decision-making" for important decisions, the gathering of twenty or thirty people to "touch all the bases" usually results in unproductive or stagnant meetings. Productive meetings are the result of the right persons discussing one subject at a time. Whitehead notes that a single conversation is difficult to maintain when a meeting has more than eleven members. The most common result is that "several conversations will emerge simultaneously, and the group deteriorates into several smaller groups."

To preserve a "flow of interaction," Whitehead suggests seven or eight members is the best number of participants. Antony Jay states that "between 4 and 7 is generally ideal, 10 is tolerable, and 12 is the outside limit." If a meeting must involve a large number of participants, it may be desirable to create committees or subgroups to work on particular topics.

Groups of four or fewer are more prone to biased decisions, and they lack the "breadth of experience and thinking to deal adequately with complex problems," says Maude. On the other hand, when groups grow to over ten, "an increasing number of people are scared into silence" and "intimate face-to-face contact between all members becomes impossible."

The optimum number for a particular working group is best found by experimentation. The ideal size is one that is large enough to provide the needed expertise to solve a problem, yet is small enough to prevent communications and control problems.

Seating Arrangements

Another factor that the astute meeting planner can vary in designing a successful meeting is the arrangement of attendees in the meeting room. The objective of the meeting should determine the type of seating arrangement in the room, as well as the kind of leadership style the meeting leader chooses. In addition, it will depend on whether the meeting planner wishes to promote or prevent conflict among individuals.

Meetings on important issues often produce the most conflict among

participants. This, in turn, often results in a deadlock between two groups in the meeting with no resolution. Kermit Moore researched this phenomenon in a large Philadelphia high school and found without exception that "opposing groups consistently sat together on opposite sides of a large rectangular table." The table was the "no man's land" across which the two opposing factions would repeatedly face off. Individuals would vote as blocks, instead of following the logic of others' arguments and changing points of view.

The solution was to intersperse the opposing groups around a circular table. This eliminated the competitive "face off" and reduced "the space between the participants from a public to a personal distance, fostering cooperation rather than competition," according to Moore.

A group leader can also increase, or decrease, his or her control of the meeting by his position at the table. In Moore's example of placing opposing groups around a circular table, the leader may choose to seat the most disruptive members next to him, since proximity increases control. In the same respect, every meeting seems to have quiet and shy participants who often have intelligent viewpoints and ideas but never make them known. Placing them next to the leader can be one of the best ways to encourage participation.

When it is essential that the meeting be "leader-central," the symbolism is strongest when the leader sits at the head of a long, narrow table. To decrease the chance of a "verbal tennis match" that can occur with a rectangular table, have the leader sit at the middle of a U-shaped arrangement.

If the meeting does not involve social contact, such as an information-giving meeting, the leader can emphasize his or her authority through position, height, and density. The classic arrangement is to place the leader at the front of the room with all other chairs facing the front. This arrangement may be enhanced if the leader is elevated, since "North Americans tend to associate height with status," says Moore. And instead of having your audience spread out in a large number of chairs, a group seated closely together can generate an energy of its own that the leader can use. "To increase audience interest and involvement," Moore suggests, "jam people together in a space that's confining enough to create mild (but no more than mild) irritation in the members of the audience."

In general, however, the meeting planner will want to increase interaction and eye contact among meeting participants. When participants can see one another's faces and read their body language, their mutual understanding will grow. For greatest eye contact, use a U-shaped or circular table.

The Meeting Room

"Surroundings tend to affect the way we think and act," states Auger, "and a poorly arranged and uncomfortable room is not likely to produce meeting results." Common sense, one may answer, yet how many meetings have you attended where something disturbed your concentration, such as an uncomfortable chair, a burnt-out projector bulb, a hot, overcrowded room, or a dance class meeting on the floor directly above? Attention to the physical setting of

a meeting may not guarantee a good meeting, but it can prevent a bad one.

The location of your meeting depends on its purpose. For an instructional meeting, a classroom may be the best place. A "ritualistic" meeting should probably be held in the best conference room available. Problem-solving or decision-making meetings need only a simple meeting room. A leader may choose to hold private meetings in his or her own office to gain a "home court" advantage. But "do not hold a decision-making meeting in the office of a high status member," caution Ernest Bormann and his colleagues—the surrounding symbolism is bound to inhibit free communication.

The size of the meeting room should match the size of the group. Maude reports that "the size of the room preferred by most participants is one that gives the impression of being comfortably full—not crowded—when everyone is present and sitting around the table."

Chairs should be comfortable, but not so comfortable that participants are prone to doze off. Electrical sockets should be available for projectors, recorders, and so forth, and the meeting planner should make sure that the correct audiovisual equipment is available and serviceable. Paper and pencils should be in ample supply, and a coffee pot should be nearby. Since teachers are likely to be tired and hungry after a long school day, Robert Maidment and William Bullock suggest simply to "feed the troops." An inexpensive tray of carrot sticks and other snacks can supply surprising motivation potential.

Good acoustics, lighting, and ventilation are other common-sense necessities for a good meeting. A room with poor acoustics or lighting is apt to lull participants to sleep or frustrate them. Poor ventilation can also make group members irritable, especially if there is antagonism between smoking and nonsmoking participants. If that occurs, perhaps the best remedy is to restrict smoking during the meeting altogether.

Incoming telephone calls, late-comers, and outside noises are also common meeting distractions. All calls to meeting participants should be held unless there is an emergency. If there are two or more entrances to the meeting room, only one should be used to minimize interruption by late-comers. And the meeting should be held in a room that is not usually subject to outside noises.

It is impossible, of course, to meet in an "ideal" room every time, but judicious attention to environmental factors that can be altered can most often ensure that the meeting environment will be comfortable and conducive to good communication.

The Art of Leading the Meeting

Good meeting planning is essential for having consistently good meetings. Yet even with the best planning, meetings can go awry. The other half of the meeting leader's responsibility consists of successfully managing the "human energy" *during* the meeting.

The style of leadership the leader chooses is always an influencing factor. One may run meetings in the traditional fashion, like a captain running his ship, giving orders and taking full command. Another may prefer to view the leadership role as a subtle facilitator who is *at the service* of the group.

The concept of leadership has been changing rapidly in recent decades. It was once recommended that the leader be the master and controller of the group. Now it is more common for the meeting leader to be a manager and facilitator whose primary function is to foster a democratic and cooperative group process among participants. In keeping with the spirit of the times, the suggestions in this section are designed more for the "leader as facilitator" and less for the "leader as captain."

The What and How of Meeting Management

Trained meeting observers and perceptive meeting participants are aware of three distinct sets of activities that take place in every working session. The first set, called the "task" or "content" activities of the group, has to do with *what* the group is doing. The second set, called "maintenance" or "process" activities, has to do with *how* the group is doing it. The third set, called "team building" activities, involves ways the group is *improving* its efficiency and *expanding* its abilities. The effective group leader should be aware of and facilitate both activities.

Task activities, says Richard Dunsing, are "rational, systematic, cognitive efforts of the kind we typically expend in talking about and working on a problem." Task activities involve the stated goals of the meeting: to make a decision, to solve a problem, to plan a budget, to exchange information. Examples of task activities are setting goals, listing priorities, using background and history, examining consequences, linking with other issues, setting assignments, and agreeing on time limits.

Maintenance activities, states Nicholas DeLuca, "focus on keeping the group in functioning order by attending to process and group interactions." Such activities involve the personal, usually unstated goals of each member: to feel acceptance and affiliation, to achieve, to have power. Maintenance activities can be evaluated by watching the eruption of conflict and how it is handled, the participants' body language, the relevance of inputs from each participant, the expression of emotion by participants (such as anger, irritation, resentment, apathy, boredom, warmth, appreciation, or satisfaction), and the mixture of seriousness and playfulness in the group.

When emotions start surfacing, it is time for the group leader and other sensitive meeting participants to start "maintaining" the human relations in the group. Once the "meeting machine" is operating smoothly again, the meeting leader can guide the group back into task activities.

Team-building activities, continues DeLuca, "are designed to strengthen the group's capacity to act in the future." Considered collectively, team-building activities involve motivation functions, training functions, and

celebration functions that serve to enhance the cohesiveness of the group as well as expand individual abilities and effectiveness. In this sense, it is no longer only the leader's knowledge and dedication to the meeting that will lead to its success, but the expertise and devotion of each participant.

Task Functions

The agenda is the primary tool the group leader has to help a group toward its goals. It defines the topics and objectives of the meeting and structures the time within the meeting. The agenda lists the work items of the meeting, the roadmap to its goals.

Topic number 1 on any agenda should be the approval of the agenda itself. This activity allows participants to review the "meeting menu" and suggest any changes they feel are necessary. For example, some members might feel that a topic should be given a larger time allotment in light of recent events, or that a certain topic should be talked about first thing. Even if no changes are made, the agenda review and approval are valuable for setting the stage for the meeting and allowing members to consider the topics collectively, before individually.

"Summation holds the greatest potential for streamlining the myriad of limited agenda meetings occurring every day," say the Palmers. Whenever possible, the meeting leader's introduction to each topic should include a brief summation of its purpose and issues, aspects agreed upon in earlier discussions, and points of disagreement. The information can "set the stage" for immediate discussion and action.

During the course of the meeting, the leader is responsible for monitoring the discussion in relation to its plan, the agenda. If the conversation gets off track, the leader should correct the direction of discussion. Questions can be a useful way to redirect the course of a meeting. For example, the leader may ask, "Just a moment, please. How does this relate to the point Janet made earlier?" A more direct approach, however, is sometimes needed: "This is interesting, but we're getting off the subject. Let's get back to the main topic."

The repetition of ideas or a general loss of interest should indicate to the leader that a subject has been discussed enough and that it is time to move on to the next topic. It is also important, however, that the leader be flexible and not hurry the meeting along too fast in the interest of sticking to the agenda. Says Maude: "Meetings need time to deal with complex problems: under pressure, they settle for quick but unsound decisions." For simple and routine decisions, it is best to heed Jack Whitehead's advice and decide them quickly, allowing time for more important decisions. This is best accomplished when the group sets its own time allotments and sticks to them.

A good way to round off the discussion of a topic is to summarize the main points brought up. If the participants feel enough time has been devoted to the topic, the leader can gracefully move onto the next topic. This may be done by simply introducing the group member listed on the agenda as responsible for the topic, or the leader may give background information on the topic

and then immediately solicit group members' ideas.

At times it may become obvious that a different approach is needed to solve a problem. The leader should stop the discussion, suggest a new strategy, and ask what the group thinks of the change. Such "restructurings" of the group process can save time and prevent unnecessary conflict.

Another problem in many meetings is that some members are more aggressive than others in their presentation of ideas. More timid members may have good ideas, but their ideas may only get half-stated or half-heard. It is up to the meeting leader to be the "best listener" to draw out ideas and help elaborate them for the group. When the focus of a discussion is a decision, the leader should step in when he or she senses there may be a consensus and ask if the group is in substantial agreement. If no consensus is in sight and the discussion is not progressing, the leader can call for a vote. If consensus is necessary, however, the leader may have to think of a new method for resolving the remaining conflicts.

When a decision is made, the meeting leader should clarify what the decision is and how it will be implemented. Responsibilities should be assigned and deadlines for action set. This solid information should be entered at once into the minutes and recorded by participants in their copies of the agenda.

Even after a meeting that involved substantial disagreement, the leader should attempt to end on a positive note. It is a good idea to save for last an agenda item that everyone can agree on.

In conclusion, the meeting leader should sum up the entire meeting and restate its decisions and the assignments of responsibility. Just before the meeting adjourns, it may be a good time to arrange the next meeting time with group members.

Maintenance Functions

Maintenance functions, says Dunsing, concern "the way people think, act, and feel while they're immersed in the task." The importance of these functions can equal that of task functions, according to Bradford, since "without attention to moods, feelings, and interpersonal relationships, a group chokes its lifeline of energy and motivation to complete the task."

Other authors address the task/maintenance issue in terms of a balance between effort and reward. According to Michael Burgoon and his coauthors, the amount of personal reward members receive influences both "the willingness of group members to participate and their satisfaction with group outcomes."

The meeting leader must choose maintenance functions, then, to create a group in which members feel involved, nonthreatened, and satisfied in their personal needs. As negative interpersonal conflicts fade out, a group can reach its maximum productivity. The natural tendencies of humans to cooperate and solve mutual problems will emerge.

Drawing out and encouraging the more timid members of a group is one maintenance function already mentioned. Not only does this increase the

"idea pool" of the group, it prevents timid members from withdrawing from active participation. Withdrawn members can cause trouble for a meeting in two ways: first, they are "dead weight" on the group's shoulders, contributing little to the meeting's productivity; second, out of feelings of resentment, they may sabotage group decisions by "forgetting" to do things or by working actively against implementation of the decisions in which they "really had no say."

Group members who feel that they and their ideas are valuable to the group will work for the group instead of against it, because they have gotten something positive from the group: acceptance, identity, and a feeling of belonging. Thus, the group leader should encourage participation from all members and make sure that the "smaller voices" are not overwhelmed.

One way to "open space" for the timid or unheard member is to take action against domineering participants, especially those who are long-winded. The Palmers present four suggestions for dealing with the disruptive participant:

- Don't yield the floor to them again when they finally yield it to another person.
- Direct the conversation to another: "John, I know this is a concern of yours as well; what do you think?"
- Summarize for them: "Let me see if I understand what you're saying before we go any further."
- Take the direct approach: "Jane, we don't have a lot of time... " or "I don't mean to interrupt, but we still have to deal with..."

It is also the leader's role to be a harmonizer when conflict breaks out in a meeting, as it inevitably will. "Harmonizing," says Bradford, "is negotiation between opposing sides in which one member serves as a third-party peacemaker, trying to retrieve the best ideas of both sides."

A certain degree of conflict, however, is part of a healthy group process. "When overdone," Bradford also warns, "harmonizing dulls the flash of creativity that confrontation can produce." But when conflict is extreme and egos are involved, the process can come to a complete standstill.

To decrease personal conflicts, it is important to distinguish clearly between ideas and individuals. Ideas, *not* individuals, should be evaluated by the group, stresses Bradford. "An individual may feel that a critical evaluation of his contribution is a rejection of himself. Such individuals, unable to separate their ideas from themselves, may withdraw. Others may fight, creating polarization and conflict in the group."

It is no easy trick getting participants to keep their minds on ideas instead of individuals, but reminders from the leader at critical times can help. A useful way to emphasize the distinction is this: Have each member write down his or her ideas for the solution of the problem. Collect the ideas and emphasize that they have become "group property." Then have the group evaluate the ideas one by one.

If possible, the leader should not take sides in an argument. When questioned about his or her opinion, the leader should relay the question back to the group: "That is a tough problem. Does anyone here have any ideas?"

Bormann and his associates warn that a leader who answers questions about substantive measures "is likely to be drawn in to conflict. Once part of the fight, he loses control of the meeting. It is difficult to lead and take an active part. The [leader] who does both may monopolize the meeting."

Indeed, monopolizing the meeting is usually what a traditional-style leader does when conflict is brewing. Yet one cannot both lead a meeting in which a personal stake is held and facilitate the meeting, as if neutral. One solution, discussed in the next section, is to train several or all members in facilitating meetings. Then when conflict erupts, the person neutral on the issue can "referee." Another approach, discussed later in this chapter, is to have a neutral person from outside the group facilitate the entire meeting (see The Interaction Method).

Team-Building Functions

Only recently have administrators realized the lasting value of improving the efficiency and attitudes of the meeting group as a whole. Team-building activities are a combination of task and maintenance activities, because they provide work items on the agenda that focus on the needs and abilities of group members. The object is to continually refine and add to meeting members' skills while increasing their motivation and cohesiveness as a group.

Team-building activities on an agenda may include specific training activities that can add to participants' communication skills as well as their ability to work as a team. As all the group members learn to facilitate the meeting, decisions can be made faster.

Motivation and celebration activities can be equally important ways to build team cohesiveness and interaction. Motivation activities, says DeLuca, "reinforce group membership and participation in the organization." Perhaps the best way to provide motivation for group members is to recognize organizational and individual achievements. If an individual creates a successful new disciplinary plan, that person should be singled out in a meeting and applauded. If a group of teachers devise a new materials distribution plan more efficient than the old one, a significant part of the group's next meeting should be spent celebrating that achievement. Whether it be food and drink in the meeting room or a gathering at a restaurant after the meeting, participants should be allowed to step away from issues and ideas for a while and enjoy their accomplishments.

You as a Participant

A meeting's success is not, of course, solely dependent on the leader's capabilities. Participants are also responsible for making meetings work.

The first rule for meeting participants is to come prepared. Read the agenda, think about the topics to be discussed, and make sure you understand the issues. Review the background information provided with the agenda, formulate your own views and opinions, and imagine what other points of view might be presented.

When you have a presentation to make at a meeting, prepare yourself fully: make an outline, prepare any visual aids you need, and rehearse your presentation. If your proposals are controversial, discuss them with key people before the meeting.

Once the meeting begins, use good manners: try not to shuffle papers or engage in side conversations. Participants are obligated to attend each meeting with a good "discussion attitude," say the Palmers, which "means being open minded, willing to consider compromise, accepting of disagreement and criticism, objective and realistic about your own contributions, and respectful of the contributions of others." Speak up when you have knowledge or ideas to share, but don't overparticipate—remember that you are part of an active group process. Ask clarifying questions when there appears to be confusion.

Help the leader by sticking to agenda topics and time limits, drawing out the ideas of others, facilitating the resolution of conflicts, and criticizing ideas instead of people. And . . . please arrive on time.

Utilizing Minutes

Minutes were invented to prevent conflict as much as to provide records. Memory, unfortunately, can be as fleeting as time itself. How much do you remember, for example, about your day just one week ago? The main problem is that even when we do think we recall something, we are often incorrect in our recollections.

Auger emphasizes this point by summarizing the results of a memory-retention study, conducted on the attendees of a psychological society meeting. Two weeks after the meeting, the average attendee could recall "only 8.4 per cent of all the points actually covered in the meeting." Worse yet, "forty-two per cent of what they thought they remembered was incorrectly recalled."

Thus, an important principle for making meetings more effective is to *document the results* of the meeting. Promptly writing the decisions made and actions required onto paper will help ensure that they are both remembered and implemented properly.

Minutes may consist of only a few simple statements outlining the major decisions of a meeting, but at the very least they should contain a certain minimal amount of information: What action is required, and how will it take place? Who is responsible for taking action? When should these actions be completed? It is also advisable to note motions that were not passed. The only way to avoid the common aftermeeting syndromes of forgetfulness, procrastination, and confusion is the proper documentation of details.

The information can be recorded by a group member or the group leader. Once a decision is reached, the minute taker should record the decision and all its details and immediately read it back to the group for confirmation. If meeting participants are using agenda copies similar to those recommended by Willard Fox earlier in this chapter, then they can create their own records of the proceedings.

Because meeting topics change from meeting to meeting, it is not advisable to have the same group member take notes at every meeting. "Choose someone who is unlikely to become involved in the meeting's controversies," suggests Oswald Ratteray. If an experienced and articulate writer is not available within the group, or absolute impartiality is required, it may be best to hire a formal minute taker.

One way to streamline this process is to use a tape recorder and extract the necessary information after the meeting. "If your meeting is dynamic," states Ratteray, "they will soon forget the equipment. When they know *why* it's there, they'll talk 'for the record' as much as to each other." Part of the stated policy of using a tape recorder should be to erase tapes as soon as the information is transcribed.

In addition to being time consuming, another disadvantage of taking minutes on the traditional notepad, says Richard Dunsing, is that "the course of events is hidden from view on the note paper. Others at the table cannot refer to past key points." An increasingly popular method is to record the proceedings of a meeting on large pieces of paper taped to the wall, or on large pads on an easel.

With this form of minutes, participants can see the past flow of ideas in the meeting and won't feel the necessity of repeating their ideas as much because others in the group have forgotten them. Another advantage of this method, says Don Halverson, is that "it serves to depersonalize the ideas—they become 'the group's'."

After the meeting, Ratteray recommends that the notes or recording of the meeting should become the basis of an executive summary "that systematically helps sort the wheat from the chaff." Under each topic or subject, a concise digest of what was discussed should be presented, perhaps focusing only on new information gained in the meeting and significant feedback. The summary should then be distributed to participants or even published in the faculty newsletter.

The rewards of this additional attention to summarizing meetings will most likely appear in future meetings. A concise record of previous discussions can help participants prepare for the next meeting. Ratteray suggests, further, that the meeting summaries be indexed under topic headings. Such archives can be used to resolve future problems and conflicts.

The Interaction Method

Another way to solve the leader/facilitator conflict mentioned earlier is to have a person from outside the group do the facilitating. In this arrangement, the leader is free to concentrate on the "what" of the meeting (the task functions), while the facilitator takes care of the "how" of the meeting (the maintenance functions). This is the approach proposed by Michael Doyle and David Straus in *How to Make Meetings Work*.

Their "Interaction Method" actually involves four separate roles that

"collectively form a self-correcting system of checks and balances." The *facilitator* is "a neutral servant of the group and does not evaluate or contribute ideas." The facilitator suggests methods and procedures for the meeting, protects members of the group from personal attack, and makes sure everyone has an opportunity to speak. In short, "the facilitator serves as a combination of tool guide, traffic officer, and meeting chauffeur."

The *recorder*, or minute taker, is also neutral and nonevaluating. The recorder writes the group's ideas on large sheets of paper on the walls, using, whenever possible, the actual words of each speaker. The advantages of this approach, according to the authors, are that "the act of recording does not significantly slow down the process of the meeting," and the written record (called the "group memory") serves as "an accepted record of what is happening as it is happening."

The *group member* is the role played by the active participants in the meeting. The group members "keep the facilitator and recorder in their neutral roles" and make sure ideas are recorded accurately. Group members can also "make procedural suggestions" and "overrule the suggestions of the facilitators." Other than these functions, their main focus is the agenda and the tasks to be accomplished.

The fourth and final role is that of the *manager/chairperson*, who is an active participant in the group yet retains the powers and responsibilities of the traditional leadership position. The manager "makes all final decisions," controls the progress of the meeting, sets the agenda, "argues actively for his or her points of view," and "urges group members to accept tasks and deadlines."

It is interesting to note that even though the interaction method was built around an autocratic leadership style, it is now a prescribed technique in the area of participative decision-making, especially quality circles. The alterations needed to adjust the method to a more democratic style, or even a leaderless group, are very simple. The most important changes, according to Frank Satterwhite, involve the "manager/chairperson, who continues to define the limits of the group's authority" but "does not usurp the roles of the facilitator or the recorder."

Many organizations have implemented the interaction method and report widespread success. Doyle and Straus's book contains a complete description of the method as well as a wealth of techniques for improving meetings.

Tools for Evaluating and Improving Meetings

According to a recent survey by Richard Gorton and James Burns, teachers still feel that the minimal requirements of meeting planning, group interaction, and follow-through are not fulfilled. A majority of teachers from eleven school systems who answered questionnaires expressed disappointment

with the way meetings were conducted in their schools. The main areas of discontent included the unavailability of background information, irregular planning procedures, control of meetings by a minority of members while others are silent, and unavailable or poorly summarized minutes.

Gorton and Burns concluded that "if teachers are not adequately involved during the meetings in productive problem solving and consensus seeking, they are likely to view their meetings as boring, unimportant, and administrator dominated."

When discontent among meeting members arises in a school, it is the group leader's responsibility to isolate the main problems and attempt to solve them. Literature on group dynamics and organizational development is replete with exercises, techniques, and "structured experiences" for evaluating and improving meetings. Some can be implemented quite easily and do not require special training, whereas others take a fair amount of preparation and followup and work best with a meeting consultant.

As an example of the former, Ernest and Nancy Bormann provide three checklists for meeting improvement. The first is a planning checklist that asks critical questions of the meeting planner, such as "What is the purpose of the meeting?"; "Who will participate?"; and "Will the room be ready and open?" The second checklist is designed for evaluating a meeting by a participant or an observer. Questions include, "Was the preparation for the meeting adequate?"; "Was a permissive social climate established?"; and "Did the leader exercise the right amount of control?" The final checklist is designed for the leader to evaluate how well he or she led the meeting: "Did you 'loosen up' the group before plunging into discussion?"; "Did you pose a challenging question to start the discussion?"

Perhaps the best way to keep meeting planning and organization in step with the needs of the school is to have meeting participants evaluate the meeting process at least twice a year. Leland Bradford provides six brief evaluation forms that members can complete at meeting's end. The leader and group can use the resulting data in several ways: a summary of the results can be announced at the next meeting; the leader can select themes from the forms and ask for discussion on those topics only; or the group can devote a whole meeting to the maintenance issues that surfaced via the evaluation forms.

Don Halverson describes several simple techniques for improving meetings. In "Going Around the Room," each participant in turn is asked to state his or her position at that moment. This method is useful "when the group is hung up around the views of those who are dominating the conversation," says Halverson, as well as "when the group seems to have run out of solutions." It is also useful for quickly evaluating a meeting and for winding up a meeting.

In "Subgrouping," the group is temporarily divided into smaller groups of two to six people to discuss either the same or different topics. In larger groups, subgrouping can keep members involved, allow every participant to be heard, and permit more than one topic to be discussed at once. (A legislature with its committee system is the epitome of subgrouping.) Jack Fordyce and

Raymond Weil report the success of subgrouping in a meeting that included both professional and clerical workers: "To surface underlying issues for the agenda, the group was divided into homogeneous subgroups. Each subgroup reported its proposed agenda items. For the first time, the voices of the clerical staff were heard."

Publications containing additional evaluation tools and suggestions for improving meetings are *Meetings: Accomplishing More with Better & Fewer* by Robert Maidment and William Bullock, *Democratic Leadership by Managing Meetings for Effective Group Decision-Making* by Mary Stephens and Robert Forest, *Taking Your Meetings Out of the Doldrums* by Eva Schindler-Rainman and her colleagues, and *Handbook of Organizational Development in Schools* by Richard Schmuck and Philip Runkel.

Conclusion

As educators are burdened with an ever-increasing number of duties and responsibilities, effective meeting techniques become more and more important. Education cannot afford the price of unproductive and unsatisfying meetings. Each meeting must become more effective at grappling with the future, more effective as an arena of controlled change. At the same time, meetings must serve to satisfy personal needs for affiliation, achievement, activity, and power, for the long-term benefit of both the organization and society.

In summation, this chapter has outlined the process of successful meeting management as follows:

At the beginning of the process, the leader's first guides are the goals and purposes he or she wishes to accomplish in the meeting. The leader must then decide what type of leadership style is best suited to his or her own nature, the structure and goals of the school, and the needs and desires of group members. Next, the meeting planner draws up the blueprints for the meeting's action—the agenda. The framework of the meeting takes form as the participants are invited, the seating arrangements are determined, the meeting room is arranged, and background information and agendas are distributed to participants.

As the meeting opens, the interpersonal and discussion skills of the chairperson come to the fore. Using the agenda as a road map, the leader can guide the group through the chaos of problem-solving and decision-making. At the same time, the leader is alert for the surfacing of negative emotions and maintains the human relations in the group as needed. As decisions are made, the leader makes sure that responsibilities are clearly designated and that deadlines for action are set. After the meeting, the leader distributes the minutes or executive summary, follows up on the decisions made, and evaluates the effectiveness of the meeting.

When meetings are run in this way, they can be both productive and satisfying! When careful thought is given to purpose, planning, and the personal needs of participants, your meetings, too, can become more effective.